

How to Create an Agency Copier Rental Agreement Contract

This process should be used by Universities or Agencies.

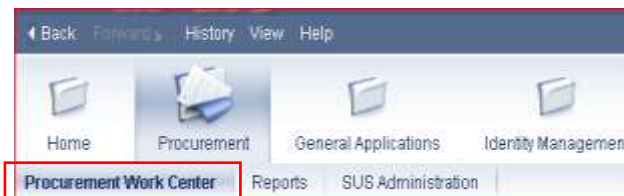
1. Using your User-ID and Password Log into MAGIC:
<https://portal.magic.ms.gov>



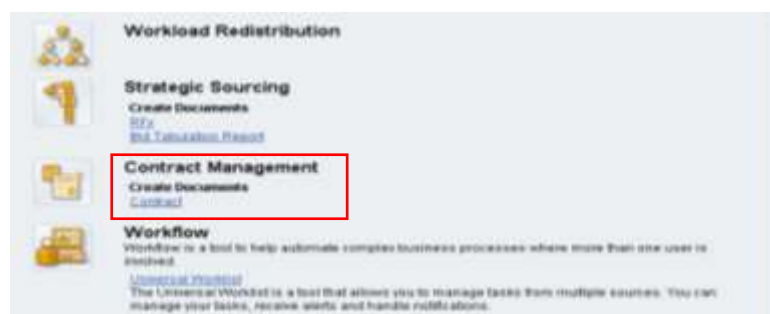
2. Select **Procurement** icon from the home page options.



3. Select **Procurement Work Center**



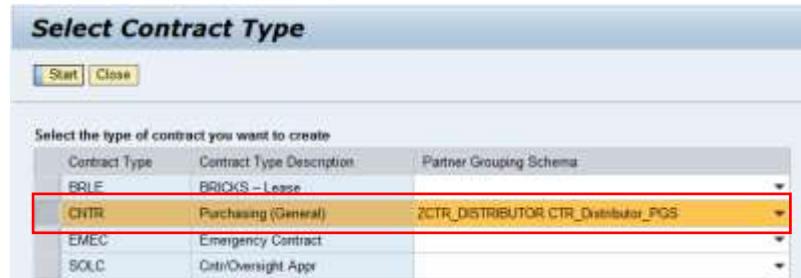
4. Select **Contract** under Contract Management



Step One: Contract Type

Select contract type "CNTR". Ensure the Partner Grouping Schema 'Distributor' is selected.

Note: If this is not activated, a new contract must be created.



Select Contract Type

Start Close

Select the type of contract you want to create

Contract Type	Contract Type Description	Partner Grouping Schema
RRLF	RRLFS - Lease	
CNTR	Purchasing (General)	ZCTR_DISTRIBUTOR CTR_Distributor_POS
EMEC	Emergency Contract	
SOLC	Contr/Oversight Appr	

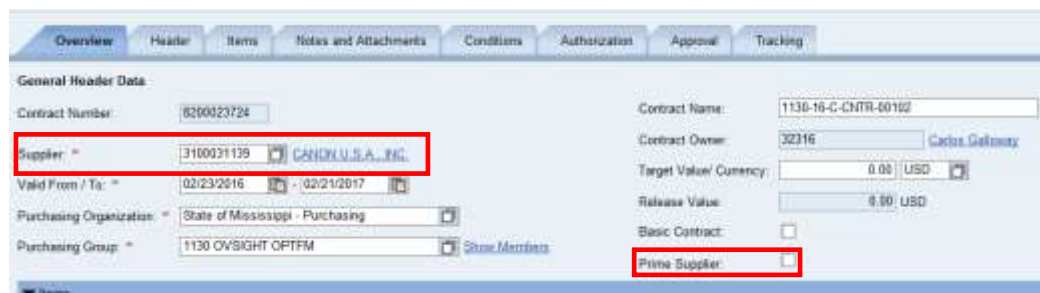
Step Two: Overview

Supplier Information

The supplier number must match the current Statewide Copier contract vendor. Please use link below to find the applicable supplier number.

Prime Supplier Flag should be checked only if the Manufacturer (e.g. Canon) will also receive the payments

<http://www.dfa.state.ms.us/Purchasing/StateContracts/CopierList600.html>



Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

General Header Data:

Contract Number: 6200023724

Supplier: 3100021139 **CANON U.S.A., INC.**

Valid From / To: 02/23/2016 - 02/21/2017

Purchasing Organization: State of Mississippi - Purchasing

Purchasing Group: 1130 OVSIGHT OPTFM [Show Members](#)

Contract Name: 1130-16-C-CNTR-00102

Contract Owner: 32316 Carlos Galtosky

Target Value/ Currency: 0.00 USD

Release Value: 0.00 USD

Basic Contract: ☐

Prime Supplier ☒

1. Set the **Valid From / To** contract effective dates by clicking the calendar icon to open and display the calendar to select the desired dates.

Note: If the rental agreement started prior to July 1, 2014, the date of 6/28/2014 should be entered as the Start Date. If the rental agreement began prior to the present date, once the past date has been entered, the FM Posting Date must also be altered to match the Start Date entered.

Overview Header Items Notes and Attachments Conditions

General Header Data

Contract Number: 8200023724

Supplier: * 3100031139 CANON U.S.A., INC.

Valid From / To: * 06/28/2014 - 02/21/2017

Purchasing Organization: * State of Mississippi - Purchasing

Overview Header Items Notes and Attachments Conditions

Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments

Basic

Identification

Contract Number: 8200023724

Contract Name: 1130-16-C-CNTR-00102

Contract Type: Purchasing (General)

Basic Contract: ☐

Confidential: Not Confidential

Distribute Contract to Catalog: No

Organization

Purchasing Organization: * State of Mississippi - Purchasing

Purchasing Group: * 1130 OVSIGHT OPTFM Show Members

FM Posting Date: * 06/28/2014

Dates

Valid From / To: * 06/28/2014 - 02/21/2017

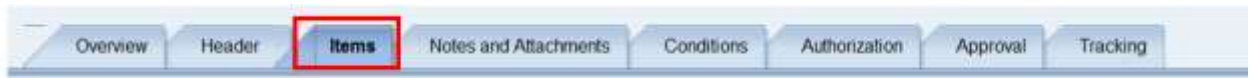
2. If there are dealers, navigate to the Header>Basic Data Tab. Scroll down to the Partner Section to add a Distributor.

Partner

Details Add Send E-Mail Call Clear

Function	Exclude	Number	Ni
• Supplier	<input type="checkbox"/>		
• Goods Recipient	<input type="checkbox"/>		
• Responsible Employee	<input type="checkbox"/>	32316	C
• Purch. Org. Auth. For Release	<input type="checkbox"/>	125	S
• Location	<input type="checkbox"/>		
• Distributor	<input type="checkbox"/>		

3. Click the **Items** Tab.



a. Line 1: Monthly Rental Rate

The screenshot shows the 'Items' tab with a table of line items. The table has columns: Line Number, Item Category, Item Number, Description, Product Category, Target Quantity, Unit, Target Value, Price, Price Unit, Price Per, and Currency. Line 1 is highlighted with a red box.

Line Number	Item Category	Item Number	Description	Product Category	Target Quantity	Unit	Target Value	Price	Price Unit	Price Per	Currency
1	Normal	1	Copier Monthly Rental	98526	36	AU	7,200.00	200.00	AU		1 USD
2	Normal	2	Overages (0066 per copy)	98526	0	AU	23.75	0.00	AU		1 USD

1. Description - (e.g. Copier Monthly Rental)
2. Product Category - enter 98526
3. Target Quantity - number of months remaining on the rental agreement or can be set to "0".
4. Unit of Measure – enter "AU"
5. Price - monthly rental rate of a single copier or multiple copiers. This rate should be outlined within your rental agreement.
6. Target Value – is calculated by multiplying the monthly rental rate times the number of months remaining on the rental agreement.

b. Line 2: Overages

The screenshot shows the 'Items' tab with a table of line items. The table has columns: Line Number, Item Category, Item Number, Description, Product Category, Target Quantity, Unit, Target Value, Price, Price Unit, Price Per, and Currency. Line 2 is highlighted with a red box.

Line Number	Item Category	Item Number	Description	Product Category	Target Quantity	Unit	Target Value	Price	Price Unit	Price Per	Currency
1	Normal	1	Copier Monthly Rental	98526	36	AU	7,200.00	200.00	AU		1 USD
2	Normal	2	Overages (0066 per copy)	98526	0	AU	23.75	0.00	AU		1 USD

1. Description - (e.g. Overages/ (per copy rate))
2. Product Category - enter 98526
3. Target Quantity – enter "0".
4. Unit of Measure – enter "AU"
5. Target Value – is calculated by multiplying the estimated monthly overage amount times the number of months remaining on the rental agreement

Note: Once the line items Target Values have been calculated, the sum of the lines should match the **Overview Target Value**.

The screenshot displays the 'Overview' tab of a contract management system. The 'General Header Data' section includes fields for Contract Number (8200024030), Contract Name (1130-16-C-CNTR-00116), Supplier (CANYON U.S.A. INC.), Valid From / To (06/28/2014 - 03/06/2017), Purchasing Organization (State of Mississippi - Purchasing), and Purchasing Group (1130 OVSIGHT OPTFM). The 'Target Value/ Currency' field is highlighted with a red box, showing 7,223.76 USD. Below this, the 'Items' section contains a table with two line items. The 'Target Value' column is also highlighted with a red box.

Line Number	Item Category	Option Type	Item Number	Description	Product ID	Product Category	Target Quantity	Option Status	Unit	Target Value
1	Normal	1		Copier Monthly Rental	96526		36		AU	7,200.00
2	Normal	2		Overages (.0066 per copy)	96526		0		AU	23.76

Step Three: Header – Additional Information

(1) Click the **Header**, then **Additional Information Subtab** tab.

The screenshot shows the 'Header' tab selected in the contract management system. The 'Additional Information' subtab is also highlighted with a red box.

(2) Enter the following information on the Additional Information tab. Fields with * are required fields.

- Reference Contract Number:** Enter the valid Statewide Copier Contract with the Manufacturer on the date the rental agreement was signed.
- Request Type:** Use the drop down and select 'Competitive Purchasing Agreement'
- Contract Category:** Use the drop down and select the value "OPTFM P1".
- Contract Performance Location:** Use the dropdown and select the applicable county where the item/service is to be utilized (If there is more than one, select "Multiple Locations" or "Statewide" or "Other").
- Material/Service Type:** Use the dropdown and select "Commodity (NON-IT)"

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments Output Additional Information

▼ Additional Information

General Contract Attributes

Reference Contract Number: 820017716

Request Type: * COMPETITIVE PURCHASING AGREEMENTS

Contract Category: * OPTFM-P1

Material/Service Type: * COMMODITIES - (NON-IT)

P-Card: ☐ Yes ☒ No

Contract Performance Location: * HINDS

Vendor Congressional District:

(3) Enter the following funding source information. These fields are required for Transparency reporting.

- Stimulus Funded:** Select the appropriate value.
- Federal Funds Indicator:** Select “Yes” if federal funds are used to procure the commodity. The system will default to “No.”

If “NO”, the contract does not require a Federal Fund % or Federal Amount (fields will be grayed out). Therefore, the State Fund% and Other Amount % must total to 100%. State and Other Amount fields must equal to the Contract Total Value.

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

Basic Data Condition Exchange Rate Thresholds Distribution Notes and Attachments Output Additional Information

▼ Additional Information

General Contract Attributes

Reference Contract Number: 820017716

Request Type: * COMPETITIVE PURCHASING AGREEMENTS

Contract Category: * OPTFM-P1

Material/Service Type: * COMMODITIES - (NON-IT)

P-Card: ☐ Yes ☒ No

Contract Performance Location: * HINDS

Vendor Congressional District:

Agency / Board Approval:

Agency / Board Approval Date:

Fed Grant Award Number:

Fed Aid Number:

CFDA Number:

Stimulus Funded: ☐ Yes ☒ No

Federal Funds Indicator: ☐ Yes ☒ No

State Fund % *	99.00
Federal Funds %	0.00
Other Amount % *	15.00
Federal Amount:	0.00
State Amount: *	6,501.36
Other Amount: *	725.36
Contract Total Value *	7,223.76

Must Equal 100%

If Federal Funds Indicator is “YES.”

- A Federal Funds % or Federal Amount must be entered.
- Fed Grant Award Number, Fed Aid Number, and CFDA Number will also be required.
- Federal, State, and/or Other % or Amount must total 100% and amounts must equal Contract Total Value.

General Contract Attributes		Material/Service Type *
Reference Contract Number:	820017716	COMMODITIES - (NON-IT)
Request Type: *	COMPETITIVE PURCHASING AGREEMENTS	P-Card: <input type="radio"/> Yes <input checked="" type="radio"/> No
Contract Category: *	OPTFM-P1	Contract Performance Location: * HINDS
Agency / Board Approval		Vendor Congressional District:
Agency / Board Approval:		Oversight Approval: <input checked="" type="radio"/> No <input type="radio"/> Yes
Agency / Board Approval Date:		Document Builder Doc Type: ZCNT_OPT_NEG
Fed Grant Award Number: *	12345A	Total Renewals:
Fed Aid Number: *	12345B	Renewals Exercised:
CFDA Number: *	10.219 CDC Grant	Buy On Behalf: <input type="checkbox"/>
Stimulus Funded: *	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Federal Funds Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
State Fund %: *	90.00	Must Equal 100%
Federal Funds %: *	5.00	
Other Amount %: *	5.00	
Federal Amount: *	361.19	Must add up to Contract Total Value
State Amount: *	6,501.38	
Other Amount: *	361.19	
Contract Total Value: *	7,223.76	

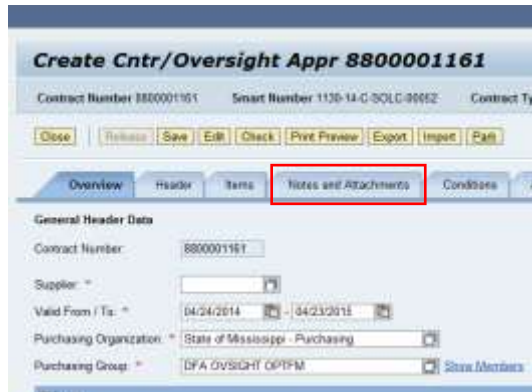
(4) Enter the option **Green Attributes** information.

- Recycled Goods:** Use the dropdown and select the applicable value (Recycled, No, Partial). If "Partial" is selected, the Recycled Good Percentage must be entered.
- Energy Efficient:** Select the appropriate value.
- Green Technology or Products:** Select the appropriate value.
- Manufactured in Mississippi:** Select the appropriate value.
- Carbon Footprint:** Free-text field for you to enter the appropriate value.

Green Attributes	
Recycled Goods:	<input type="text"/>
Recycled Goods Percentage:	<input type="text"/>
Energy Efficiency:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Green Technology or Products:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Manufactured in Mississippi:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Carbon Footprint:	<input type="text"/>

Step Four: Notes and Attachments

(1) Click the main **Notes and Attachments** tab.



Create Cntr/Oversight Appr 8800001161

Contract Number 8800001161 Smart Number 1130-14-G-SOLC-0002 Contract Type

Close Release Save Edit Check Print Preview Export Import Run

Overview Header Items **Notes and Attachments** Conditions

General Header Data

Contract Number 8800001161

Supplier *

Valid From / To * 04/24/2014 - 04/23/2015

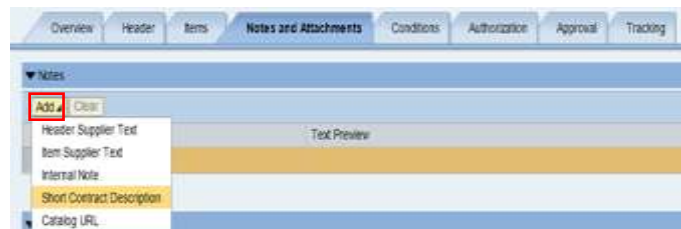
Purchasing Organization * State of Mississippi - Purchasing

Purchasing Group * DFA OVERSIGHT OPTFM Show Members

(2) Click **Add** then **Short Contract Description**. The description is a required field and can be up to 60 characters in length. Enter a brief description of the contract.

a. The description must begin with the following phrase:

- Agency Copier Rental Agreement with.....



Overview Header Items **Notes and Attachments** Conditions Authorization Approval Tracking

▼ Notes

Add Clear

Header Supplier Text Text Preview

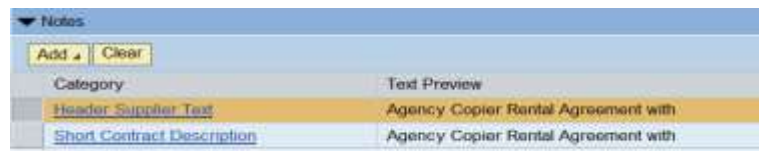
Item Supplier Text

Internal Note

Short Contract Description

Catalog URL

(3) Click **Add** then **Header Supplier Text**. Enter a detailed description of the items requested.



▼ Notes

Add Clear

Category Text Preview

Header Supplier Text Agency Copier Rental Agreement with

Short Contract Description Agency Copier Rental Agreement with

- (4) Select the **Add Attachment** button to upload all rental agreements and a copy of the State contract price list highlighted with copiers being leased.

The screenshot shows a software interface with two main sections: 'Notes' and 'Attachments'. The 'Notes' section has an 'Add' button and a table with two rows. The first row has 'Header Supplier Text' in the 'Category' column and 'Agency Copier Rental Agreement with' in the 'Text Preview' column. The second row has 'Short Contract Description' in the 'Category' column and 'Agency Copier Rental Agreement with' in the 'Text Preview' column. The 'Attachments' section has a red box around the 'Add Attachment' button, followed by 'Edit Description', 'Versioning', 'Delete', and 'Create Qualification Profile' buttons. Below these buttons is a table with columns: 'Assigned To', 'Category', 'Description', 'File Name', 'Version', 'Processor', 'Checked Out', 'Type', and 'Size'. A message icon and the text 'The table does not contain any data' are at the bottom of the table.

- (5) A small window will display; select the **Browse...** button to select a document from your computer.

The 'Add Attachment' dialog box is shown. It has a title bar with 'Add Attachment' and standard window controls. The main text says: 'Here you can upload an attachment. You have to assign it to either the document general data or to an item'. There are four fields: 'File' (with a 'Browse...' button next to it), 'Description' (empty), 'Assign To:' (with a dropdown menu set to 'General Data'), and 'Visible Internally only' (with a checked checkbox 'Keep this attachment internal'). 'OK' and 'Cancel' buttons are at the bottom right.

- (6) Enter a description of the document to be added.

The 'Add Attachment' dialog box is shown again. The 'File' field now contains the path 'C:\Users\CG538448\Desktop' and the 'Browse...' button is still there. The 'Description' field is now filled with 'Copier Rental Agreement'. The 'Assign To:' dropdown is still set to 'General Data', and the 'Keep this attachment internal' checkbox is still checked. 'OK' and 'Cancel' buttons are at the bottom right.

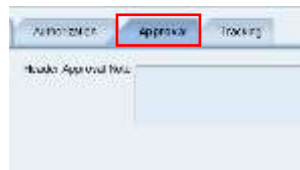
- (7) Once all the information is entered click **OK**.

The system will display the added document to the table below. Ensure the “Visible Internally only” flag is unchecked to post the rental agreement to Transparency.

Attachments						
Add Attachment Edit Description Versioning Delete Create Qualification Profile						
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only
Document Header	Standard Attachment	Copier Rental Agreement	How to Create an Agency Copier Rental Agreement Contract.docx	1		<input type="checkbox"/>

Step Five: Release for Approval

- (1) Once all required information has been entered, select **Release** [Release](#) to send the contract through approval.
- (2) Approvals can be displayed by selecting the **Approval** tab.



- (3) The Commodity Oversight Approvers are required to approve all P1 Requests.

Approval						
<div> <div>Current Status: ACTIVE</div> <div>Current Process Step: SRM Contract Approval</div> <div>Currently Processed By: David Cranford Wilson Beard</div> <div>Approval Process Date: Overnight at SRM</div> <div>Follow Up: <input type="checkbox"/> Work Item to Requester at Process End</div> </div> <div> Release Print </div>						
Header Approval Status						
Add Approver Remove Approver						
Sequence	Process Step	Status	Processor Determination	Processor	Received On	Processed On / Forwarded By
1	SRM Contract Approval	Open (No Decision Maker)	CTR Commodity Oversight 1 Approval	David Cranford Wilson Beard	05/20/2014 14:54:42	